

The SSI Program, created by the Operations and Fiscal Bureau in February 2004, is responsible for the management of all Social Security claims and benefits for our foster children. The goal of the SSI Unit is:

"To actively and aggressively pursue SSI benefits for all eligible Montana children within the Foster Care System."

We encourage the support and participation of Foster Care Families, Caregivers and their Social Workers to secure the optimum services and benefits available to Montana's children.

For more information & assistance, please contact the SSI Specialist for your Region:

***Margaret Beavers – 841-2438
Region 5***

***Paddy Ferriter – 841-2441
Region 4***

***Dale Hause – 841-2424
Region 2 / Region 1 (Northern)***

***Elizabeth Skinner – 841-2444
Region 3 / Region 1 (Southern)***

**DEPARTMENT OF PUBLIC HEALTH & HUMAN SERVICES
CHILD & FAMILY SERVICES DIVISION**

SSI PROGRAM

**Park Avenue Building
301 South Park
P.O. Box 8005
Helena, MT 59604
406-841-2400
406-841-2487 (FAX)**

PROTOCOL FOR SSI ELIGIBLE CLIENTS

Please keep all CAPS screens updated timely and contact your SSI Specialist with any information or questions about SSI and SSB children or children you think may be or become SSI or SSB eligible.

Please direct all matters related to Social Security to your region's SSI Specialist:

Margaret Beavers (841-2438)
Paddy Ferriter (841-2441)
Dale Hause (841-2424)
Elizabeth Skinner (841-2444)

INITIATING THE PAYMENTS:

When adding a placement service on SERP, the Social Worker will get an alert to consider applying for SSI for the child. If the child has an obvious physical/cognitive handicap (*such as developmental disabilities, speech impairment, mental retardation, deafness, blindness or cerebral palsy*) or the child has or appears to qualify for a mental illness diagnosis (*such as Depression, RAD, ADHD, FAS, etc.*), the Social Worker should contact their SSI Specialist to initiate an SSI claim. The Social Worker should be prepared to provide the SSI Specialist with:

- A copy of the current court order,
- Medical, Psychological and School reports from the child's file
- Any other records the SSI Specialist requests from the child's file

Social Workers should NOT be completing ANY SSI, SSB or State Supplement applications.

ELIGIBILITY DATES:

Once the SSI claim is approved or the payee is changed, the SSI Specialist enters the date of eligibility on the APPL, APPD and CELL screens. Central Office generates a list of eligibility dates for children already receiving SSI. The Social Worker should contact the SSI Specialist to obtain dates or other Social Security information for children not on the list, or any other question regarding eligibility.

STATE SUPPLEMENT PAYMENT:

The SSI Specialist will complete the DFS-108 application for the State Supplement which the Social Worker can view on DocGen. If there are any questions regarding a child's eligibility for this benefit, contact your SSI Specialist. **Social Workers should NOT complete DFS-108's or DFS-109's.**

SERVICE AND PROVIDER CODES:

If the child is in family foster care, the current foster care services code needs to be changed. PFSSI (SSI foster care) and SPSNS (State Supplement payment) services should be added for the child's provider on the FSPL screen by the Social Worker for children in regular foster care, effective the first day of the month eligibility is indicated on CELL. This pays the foster parents at a slightly higher rate than regular foster care, and the entire SSI amount is paid out each month so the trust account does not exceed the \$2,000 limit. The PFSSI payment rate is crucial to be utilized for children in regular foster care to ensure that the child does not lose SSI eligibility. The SPSNS payment is required by ARM 11.5.410 if the child receives the State Supplement payment. If the child is in a group home placement, they will receive the State Supplement, but no changes to the service codes are needed.

Institutionalized children or children placed out-of-state are NOT eligible for the State Supplement.

CHANGES:

The Social Security Administration requires the State comply with providing timely, accurate reports for children receiving any type of SSI or SSB benefits. All of the following are mandatory events the Social Worker needs to report by phone or email immediately to their SSI Specialist to assure the correct forms are completed:

- Placement changes (adoption, return to home, trial home visits, emancipation, new provider/facility, age 18, etc.)
- Child becomes employed and earns wages of any kind

The Social Worker should enter the new information on the appropriate CAPS screens promptly and, if the child is employed, mail copies of ALL current and ongoing wage statements (SSA requirement).

SOCIAL SECURITY NOTICES:

Copies of SSA Notices verifying SSI and SSB award amounts, eligibility status, etc. will be forwarded to the Social Worker for the child's file. Generally, these copies are forwarded for information-only purposes and the Social Worker will not need to take any further action. The SSI Specialist will let the Social Worker know if any follow up is required. **When in doubt, contact your SSI Specialist!**

Social Security and Supplemental Security Income (SSI): What's the difference?

*There is often confusion about Social Security (SSB) and Supplemental Security Income (SSI).
However, the programs are different...*

The Social Security benefit programs (SSB) are “**entitlement**” programs. This means workers, employers and the self-employed pay for the benefits with their Social Security taxes. The taxes collected are put into special trust funds. You qualify for these benefits based on your work history (or your spouse or parent). The amount of the benefit is based on these earnings, and does vary. When we apply for *these* benefits on behalf of a child, it is because a parent is either deceased or disabled, and the child is *entitled* to receiving a benefit from the taxes their parent paid into those special trust funds.

SSI is a “**needs based**” program for **disabled persons with limited income and resources**. General tax revenues pay for the program, not Social Security trust funds. The benefit amount is based on Federal and State laws, which take into account where you live, who lives with you and what income you receive. If a person qualifies *financially*, Social Security then determines whether they qualify *medically*. In order to qualify medically, a person must have a physical and/or psychological condition that is expected to last a year or more (*or result in death*), which severely limits their activities and meets the criteria for disability as defined by the Social Security Administration. When we apply for *these* benefits on behalf of a child, it is because they have been identified as having functional limitations (either physical or psychological), which prevent them from engaging in many of the activities “*normal*” children their age participate in. Because it is a *needs based* program, a final determination whether or not the child is eligible for SSI benefits rests with the SSA Commissioner.

SOCIAL SECURITY BENEFITS (SSB)

BASED ON ENTITLEMENT:

- **Benefit Amount Varies:** Types, based on parent's earnings, include: Retirement, Survivor, Disability or Blindness;
- **NO** Income or Resource Limit;
- Living arrangements (where child lives and who lives with them) does **NOT** affect benefits.
- Child does **NOT** receive automatic Medicaid coverage – must apply for and often requires a Spend-Down or Cash Option plan.

REPORTING REQUIREMENTS:

- ✓ Report to SSA when the child enters or leaves State custody/Foster care;
- ✓ The State must verify the child's Student Status with SSA when he/she turns Age 18.

THE STATE MAY USE ANY AVAILABLE FUNDING SOURCE (including IV-E) WITHOUT LIMITATIONS OR PENALTY!

SUPPLEMENTAL SECURITY INCOME (SSI)

BASED ON NEED:

- **Benefit Amount Fixed** (Currently \$674/month);
- Limited Income & Resources allowable;
- Benefits awarded due to the disability or blindness of child;
- Categorically-Eligible for Medicaid;

REPORTING REQUIREMENTS:

- ✓ **ALL Income & Resources** must be reported within 30 days of receipt.
This includes: IVE funding, Child Support, Wages, Indian Monies, Property, Life Insurance, etc.
- ✓ Placement changes;
- ✓ Address changes;
- ✓ Cost-of -Care changes;
- ✓ Status Changes (*including Adoption, Emancipation & Return to Home*).

THE STATE MAY NOT BE ABLE TO USE SSI & IV-E FUNDING CONCURRENTLY WITHOUT PENALTY AND POSSIBLE CESSATION OF SSI BENEFITS – CONSULT THE SSI UNIT!!!